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A2

WO 01/39076 (54) Title: SYSTEM AND METHOD FOR PROVIDING INFORMATION TECHNOLOGY IT EXPERT REFERRAL OVER A NETWORK

(57) Abstract: A system and method for assigning an IT expert to a request for assistance. The invention allows users to request assistance over the Internet to an IT expert server having a file of qualified IT experts. The trouble "ticket" is assigned and alias and is sent out to a number of IT experts having the correct qualifications who then have an opportunity to respond. The first to respond is assigned an alias and communicates with the requester via the IT expert server. Upon completion of the ticket, the IT expert so designates and the requester is asked to fill out a survey noting the satisfaction with the service provided. IT experts are assigned rankings and are paid and solicited for further work based upon the ranking.

Title of Invention: System and Method for Providing Information Technology IT
Expert Referral Over a Network

Relationship to Other Applications:

This application is a utility application which claims the benefit and priority of
Professional Application No. 60/167,065 entitled "System and Method for Providing Expert
Over a Network" filed 11/23/99.

Field of the Invention:

This invention relates generally to network access to for IT expert referral. More particularly the present invention provides a system and method for obtaining assistance via work notification to information technology (IT) experts and subsequent IT expert-to-client contact.

Background of the Invention:

As computers and software proliferate, the need for help desk assistance becomes and more critical especially to those customers who are not technically sophisticated. difficulty is that individual customers become frustrated when they must sit on a help or many hours before they get human assistance or, equally frustrating, are shunted to a recently asked question screen, which has the answers to many questions that are not all for the particular problem that the individual customer is experiencing.

The present invention seeks to solve these problems by qualifying and establishing a number of IT experts in various hardware and software fields. For example, the present invention will solicit and store qualifications for IT experts in Microsoft Windows, Sun products, Apple products, and indeed, many other hardware and software products. These IT experts, most of whom will be independent contractors (although not necessarily so), will be easily accessible via the database of the present invention.

1 After registration with the system of the present invention and providing customer
2 contact information such as telephone number and email, when a customer needs particular
3 assistance with a particular product, the customer will access the website of the present
4 invention and state the problem being experienced. Once a query for help is made, the
5 system of the present invention sends a pager or other notification signal to an appropriate IT
6 expert who can handle the problem being experienced by the customer. Indeed, a call may
7 go out to multiple IT experts all of whom have the option to respond to the particular request.
8 Contact information is also presented to the IT experts in this first communication.

9 Whichever IT expert responds first to the request, that IT expert will have the contact
10 information to immediately contact the customer experiencing the problem. In this fashion,
11 one of the key problem areas, that is time of responding to a problem, is minimized.

12 The customer can then respond either via email through the server of the present
13 invention to the customer or via Internet telephone through the server of the present invention
14 to the customer. In either case response goes through the server of the present invention in
15 order to be able to track such statistics as response time, and whether the customer was
16 satisfied or dissatisfied with the response of the particular IT expert.

17 Once the problem is solved, the customer who experienced the problem is given the
18 option of responding to a questionnaire simply asking if the problem was solved, if the IT
19 expert was responsive to the question, and several other key questions that will assist the
20 system of the present invention in evaluating the performance of the IT expert.

21 Statistics will be kept on the performance of IT experts involved in the system. For
22 those IT experts who continually rank highly, calls for assistance will continue to go to those
23 IT experts on a priority basis. For those IT experts who are not as successful, they will fall
24 lower in the priority list and will not receive as many calls for assistance from the system.

1 A key aspect of the present invention is that the system is adaptive. If an Expert who
2 is lower on the priority list continues to get high grades from customers for accomplishing
3 tasks, that Expert can climb in the rankings and achieve a priority ranking thereby receiving
4 more request for assistance and hence, more revenue from responding to customers needs.
5 Conversely, those IT experts who do not receive favorable rankings from customers will fall
6 in the overall rankings of IT experts and will not receive as many phone calls for assistance
7 an hence, will not receive as much revenue from the present invention.

8 All transactions, in the preferred embodiment occur via the Internet, although this not
9 meant as a limitation, whether they be by email, or Internet telephone. It will be apparent to
10 those skilled in the art that communication between customer and Expert can also occur via
11 telephone as well. And all transactions will proceed through the server of the present
12 invention so that activities of IT experts and statistics on types and frequencies of certain
13 troubled calls can be monitored.

14 In summary what is created is a virtual help desk, having IT experts in many different
15 areas of IT expertise immediately and competently responding to the queries for help from
16 customers who are in need.

17

18 **Brief Description of the Figures:**

19 Figure 1 illustrates the architecture of the present invention.

20 Figure 2 illustrates the overall assign up, assignment, and Expert response flow of the
21 present invention.

22 Figure 3 illustrates the Expert enrollment and interaction with the system of the
23 present invention.

24 Figure 4 illustrates login screen for the Expert Help Network.

1 Figure 5 illustrates a screen in which the customer selects whether he needs help or is
2 an IT expert.

3 Figure 6 illustrates a screen consisting of a data entry sheet requesting a plurality of
4 answers pertaining to customer identification.

5 Figure 7 illustrates the customer's customer ID and password for entering the Expert
6 Help Network.

7 Figure 8 illustrates a screen which confirms the customer's Name, city, and email
8 address that is currently valid in the system.

9 Figure 9 illustrates a plurality of questions pertaining to the customer's problem.

10 Figure 10 illustrates a plurality of items of information regarding the customer's
11 ticket.

12 Figure 11 illustrates a plurality of statuses regarding the customer's ticket(s).

13 Figure 12 illustrates a plurality of criteria for IT experts to join the Expert Help
14 Network.

15 Figure 13 illustrates a plurality of questions and answers pertaining to IT experts.

16 Figure 14 illustrates a synopsis of how the network functions and the role of IT
17 experts.

18 Figure 15 illustrates a plurality of requests for items of information regarding contact
19 information for the IT expert(s).

20 Figure 16 illustrates a plurality of pull down menus regarding the IT expert's skills.

21 Figure 17 illustrates a request for a plurality of items of information regarding
22 experience as an IT expert.

23 Figure 18 illustrates a plurality of items of information regarding references for IT
24 experts.

1 Figure 19 illustrates the conceptual flow for assigning an alias to customer problems
2 and IT expert's assignments.

3 **Detailed Description of the Invention**

4 Referring to Figure 1, the overall architecture of the present invention is illustrated.
5 A plurality of customers, indeed anyone connected to the internet 9 or a network
6 contemplated as one to be used with the present invention, her illustrated simply as two
7 customers, customers 10 and 12, who are connected to the internet, may experience some
8 form of computer-related or other type of problem. Customers 10, 12 contact the Expert
9 Reference Server (ER Server) 16 via a network, preferably the Internet 14 although this is not
10 meant as a limitation. For example other networks in addition to the Internet can also be
11 used. Customers 10, 12 pose the particular question or problem being encountered with their
12 system to the ER Server 16 over the network 14.

13 Depending upon the type of problem cited, ER Server 16 reviews its database of IT
14 experts 20 for the individual or individuals who are capable of responding to the questions
15 from customers 10, 12. This database of IT experts not only has qualifications of the IT
16 experts but also maintains a database of their availability if, for example, an Expert is on
17 vacation for a period of time or is unavailable during a period of the day. Upon determining
18 the appropriate individual(s) who can respond to the problem, ER Server 16 sends a message
19 via any means known in the art such as wired or wireless as in the case of beepers and cell
20 phones, in this case illustrated as over the public switch telephone network (PSTN) 18 to the
21 beepers of IT experts 22, 24, 26 with a general reference to the type of problem being
22 encountered. This notification via PSTN is for illustrative purposes only. It is anticipated
23 that the IT experts can also be notified via the Internet and the various means, such as
24 Internet paging and telephone for example, available via the Internet.

1 IT experts **22, 24, 26** are beeped and, preferably an alphanumeric display noting the
2 problem being posed by customers **10, 12** is displayed. At that point any one of the IT
3 experts **22, 24, 26** can respond to ER Server **16** that he will handle the problem being posed.

4 Contact from IT experts **22, 24**, and **26** can occur via the public switch telephone
5 network **18** or via the network **14** to the ER Server **16**.

6 Thereafter, and assuming, for example expert **22** responded **first** to the query, ER
7 Server **16** allows contact between expert **22** and, for example customer **12** in the following
8 fashion:

9 Internet telephone service can be used whereby expert **22** is connected to customer **12**
10 through server **16**. In this fashion, ER Server **16** can monitor the length of the call and broker
11 the connection between expert **22** and customer **12**. Alternatively, the telephone number of
12 customer **12** can be provided to expert **22**. Thereafter, expert **22** can contact customer **12** to
13 solve the problem by voice communication. Finally, ER Server **16** can provide the email
14 address of customer **12** to expert **22** thereby allowing email response to the problem being
15 posed and also allowing back and forth communication over network **14**.

16 After the completion of the service call, expert **22** provides notification to ER Server
17 **16** that the call has been successfully completed. Expert Server **16** logs the completion time
18 and date of the trouble call that was requested by the customer. In this way, statistics on the
19 general length of time to respond to and solve customer problems can be logged. Further,
20 information on the individual expert can also be kept in the following fashion:

21 ER Server **16** not only brokers a trouble call between customers **10, 12** and IT experts
22 **22, 24**, and **26**, but also keeps track of how well the individual IT experts perform in their
23 assigned tasks. For example, at the completion of each trouble call, and after the expert has
24 provided notification to the ER Server that the call has been completed, the ER Server
25 provides a questionnaire to the customers **10, 12** seeking input on customer satisfaction with

1 the service being offered. At that point, customers 10, 12 have the opportunity to respond to
2 ER Server 16 regarding whether the IT experts 22, 24, or 26 solved the problem successfully
3 and in a timely fashion.

4 ER Server 16 collects statistics on the performance of IT experts 22, 24, and 26,
5 thereby monitoring the performance of these IT experts. If any of the IT experts continually
6 score poorly in the estimation of customers 10, 12, the ranking of that particular expert will
7 be established as lower than that of the IT experts who perform successfully on various
8 assigned tasks. This has several ramifications. If a particular expert does not perform well,
9 that expert is put low on the priority list for being contacted by ER Server 16. If the expert
10 continues to perform poorly on the tasks that are assigned, eventually the expert will be
11 eliminated from the roll of IT experts who can respond to service calls. Conversely, if an
12 individual expert who initially performed poorly begins to perform better on service calls
13 assigned to that IT expert, ER Server 16 will keep track of that improvement thereby raising
14 the priority of that expert and list of IT experts who will be called to respond to service calls.
15 In this fashion, expert database 20 is continually updated and quality control on the IT
16 experts who are contacted and assigned customer tasks can therefore be maintained.

17 In this fashion, a series of problems are solved by the system and method of the
18 present invention. First, individual customers 10, 12 no longer have to wait inordinate
19 amounts of time for response to trouble calls on their computer systems.

20 Server 16 establishes the mutual arrangement between customers 10 and 12 before
21 any service call is made to IT experts 22, 24, and 26. In this fashion, IT experts 22, 24, and
22 26 do not have to be concerned about how to invoice and collect fees from customers 10, 12.

23 Customers 10, 12 benefit from having the best IT experts who can solve technical
24 problems since the ER Server 16 continually updates and establishes quality control via its

1 expert database 20 over the IT experts who are called to respond to trouble calls in the first
2 place.

3 On a periodic basis, ER Server 16 and the business entity that surrounds that server,
4 remits to IT experts 22, 24, and 26 their fees for the service calls responded to on a monthly
5 or quarterly basis as desired.

6 Referring now to **Figure 2** the overall assign up, assignment, and expert response
7 flow of the present invention is illustrated. A customer accesses the system of the present
8 invention 100 preferably over the Internet although this is not meant as a limitation. For
9 example, a customer may also provide information via a telephone or other means of
10 communication.

11 Confirmation of the sign-up is then sent to the member via electronic mail 102
12 providing a log in ID and password. Thereafter, either immediately upon receipt of the e-
13 mail or on a subsequent occasion when services are needed the member logs into the system
14 **104.** At this point the member has a number of options.

15 If the member is signing on initially the member can create or change the membership
16 profile **148.** This profile provides information on the member's organization, the type of
17 equipment, and any other information relating to software and operating systems being run
18 on the equipment and the network as appropriate.

19 The member also has the option of changing the member's password **150.** If the
20 member has already provided a request for assistance referred to as a "ticket" a member can
21 view the ticket history **152.** If the ticket relates to a particular problem that the member has
22 asked to be solved, the member can view the specific ticket **154** to insure that the problem
23 has been stated appropriately. Additionally the member is asked to fill out a survey **156** that
24 relates to how well the problem was solved, was the problem solved in a timely way, was the
25 interaction with the Expert satisfactory and other factors that would give rise to quality

1 assurance with respect to managing the IT experts who are affiliated with the system of the
2 present invention. After the survey is completed it is submitted by the member 158 and the
3 ticket is closed by the system. Thereafter billing for the services is accomplished 159.

4 Once the member has an account number and a password, the member can call in at
5 any time whenever there is a problem requiring a consultant. In this instance, a member logs
6 onto the system 104 and creates a ticket 106 which describes the difficulty being encountered
7 in as much detail as possible. Once the screen detailing the problem has been completed the
8 ticket is submitted 108 by the member. Confirmation email is sent to the member. The
9 server of the present invention then takes the ticket that is submitted and e-mails it 110 to the
10 appropriate IT expert group for response. In this instance the group may be a group of
11 network IT experts, a group of IT experts in a particular software application, and the like. It
12 should also be noted that communication with the IT expert groups is made by regular e-mail
13 and wireless devices to the extent that the database has the appropriate communication
14 information. This system then continually inquires to determine if any IT expert has
15 responded to the ticket and indicated that he or she would respond. This is referred to as
16 "booking" the ticket 112. If after a definable number of minutes the ticket is still not booked
17 114 the system sends e-mails to another group of IT experts who can appropriately respond
18 to the question being posed.

19 If the ticket has been booked by an IT expert 112 the system determines how the
20 ticket was booked 116. If the IT expert responded over the Internet the internet procedures
21 invoked 117 as will be more fully explained below.

22 If the IT expert responded via e-mail the IT experts e-mail response is received by the
23 system 118 and the system assigns the ticket to the IT expert who responded 120.

24 Upon assigning the ticket to the IT expert 120 an e-mail or other notification is sent to
25 the IT expert requesting that he initiate customer contact. In addition, e-mail is sent to other

1 IT experts in the group of IT experts to whom e-mail was sent informing them that the ticket
2 was booked to another IT expert **124** although the identify of the IT expert to whom the ticket
3 was booked is not necessarily disclosed.

4 As further noted below, communication and record keeping of the system involves
5 assigning alias numbers to both the request for assistance and for the response by the IT
6 expert in order to ensure that communication flows through the server of the present
7 invention.

8 The IT expert then communicates with the member **128** and the member interacts with the IT
9 expert **126** to solve the problem disclosed in the ticket.

10 When the ticket has been closed, that is, the problem has been solved by the IT
11 expert, the IT expert so notifies the server of the present invention to close the ticket and
12 enters information that describes how the problem was resolved **130**. The server then sends
13 an e-mail message to the member **132** noting that the IT expert has closed the ticket and has
14 solved the problem. The e-mail also requests that the member fill out a survey to note the
15 members satisfaction with the problem solution, the IT experts performance, and any other
16 factor that affects the resolution of the ticket originally submitted by the member.

17 The survey is a critical aspect of the present invention and is done in an automated
18 fashion to minimize the labor associated with the member's participation in the survey.
19 Further, the survey serves as a basis for paying IT experts for work accomplished or not
20 paying IT experts when the result has been unsatisfactory to the member.

21 After submission of the survey to the member, the system continually inquires in its
22 own records to determine if the survey report has been filled out **134**. If the survey has not
23 been filled out after two days, a second e-mail request for the completion of the survey is sent
24 to the customer **136**. The system then again keeps track internally to determine if the survey
25 has been filled out **138**. If the survey has not been filled out after, for example two days, a

1 final e-mail request is sent to the member 140 to fill the survey out. The system then again
2 internally monitors whether the survey has been completed 142. If the survey has not been
3 completed the survey is automatically filled in with certain default values and the ticket
4 status is changed to a "closed" status 144. Thereafter billing of the member ensues 145.

5 When the member is in the process of completing the survey the member logs in 146
6 and views the ticket history 152.

7 The member can then complete the survey as noted earlier 156 and submit that survey
8 to the system 158. Thereafter billing ensues.

9 Referring now to **Figure 3** the IT expert enrollment and interaction with the system is
10 illustrated. An IT expert initially logs onto the system of the present invention and signs up
11 to become an IT expert 160 who can be called upon to satisfy various tickets. The system of
12 the present invention then sends an e-mail to the IT expert 162 confirming his registration
13 and informing him of the pending assessment of the IT expert qualifications, and that this
14 will take place BEFORE the IT expert is assigned any tickets by the system. In this way the
15 entity managing the server of the present invention ascertains the IT expert's qualifications
16 and areas of IT expertise. If the IT expert is not qualified in any of the areas in which the
17 system responds to members an e-mail is sent to the IT experts so notifying the IT expert. If
18 the IT expert has the requisite qualifications a confirmation e-mail is sent to the IT expert 168
19 and the IT expert is then logged onto the system. The IT expert is assigned a password and
20 customer identification number for which the IT expert can then log in 170.

21 At any point the IT expert can change or alter the IT expert's profile 172 thereby
22 allowing the IT expert to more particularly respond to and be provided with information on
23 tickets.

1 When the IT expert logs in **170** the IT expert can check in and out of the system **174**
2 and change the IT expert's availability **176** so that the system knows when the IT expert will
3 be available to receive requests for ticket response.

4 The IT expert can also note the IT experts own tickets **178** that have been responded
5 to, assigned and are in progress. The IT expert can click on any ticket that is noted and view
6 a specific ticket **180** and determine if the ticket has been closed **182**. If the ticket is not
7 closed, it continues to be listed on those open tickets assigned to the IT expert **178**. If the
8 ticket is closed as far as the IT expert is concerned, the IT expert assigns a "close pending" to
9 the ticket as noted earlier in Figure 2 **130**.

10 Once the IT expert logs in **170** the IT expert can also go to a file of unassigned tickets
11 **184** and view any specific one ticket **186** and determine if the IT expert can respond to the
12 ticket. If the IT expert can respond the IT expert will book the ticket as noted earlier in
13 Figure 2 **120**.

14 Upon entering the website, **Fig. 4**, the customer is presented with a login screen
15 which asks also whether the customer is an IT expert or needs help **200**. If the customer is not
16 a member of the service, he is presented with a screen, **Fig 5**, in which he must select
17 whether he needs help or he is an IT expert **202**.

18 If the customer selects the "I need help" option **202**, the customer is presented with a
19 screen, **Fig. 6**, which consists of a data entry sheet requesting a plurality of answers
20 pertaining to customer identification **204**. Upon completion of the data entry sheet, **Fig. 6**,
21 the customer is presented with a screen, **Fig. 7**, which furnishes the customer with his
22 customer ID and password **206**.

23 In the Customer Home screen **Fig. 8**, which confirms the customer's Name, City, and
24 email address **208** that is currently valid in the system. Upon selecting "View/Create Ticket"
25 the customer is presented with a screen, **Fig. 9**, which asks whether this is a new ticket **210**

1 and under what category this ticket is to be considered 212. Examples of categories are MS
2 Exchange, Windows NT, etc. Additionally, the customer is furnished with a text box in
3 which he enters a description of his current problem 214. The customer is also presented
4 with a button which allow him to enter the ticket 216.

5 Once the ticket is entered, the customer is presented with a screen, Fig. 10, which
6 furnishes a plurality of items of information regarding the customer's ticket 218. The
7 customer is notified by the IT expert via email (although this is not meant as a limitation)
8 when he has been assigned to the trouble call 220 by the server.

9 If the customer selects "Ticket History," 222 he is presented with a screen, Fig. 11,
10 which furnishes a plurality of statuses regarding his ticket(s) 224.

11 If the customer selects the "I am an IT expert" option 200, the customer is presented
12 with a screen, Fig. 12, which gives some of the criteria for IT experts to join the IT expert
13 Help Network 226. If the customer selects the "FAQ" (frequently asked questions) button
14 228, he is presented with a screen, Fig. 13, which answers a number of question pertaining to
15 IT experts and the IT expert Help Network.

16 If the customer selects the "How it works" button 230, he is presented with a screen,
17 Fig. 14, which gives a synopsis of how the IT expert Help Network functions and the
18 function of IT experts in the network.

19 If the customer selects the "Sign up" button 232, he is presented with a screen, Fig.
20 15, which furnishes a plurality of requests for items of information regarding contact
21 information for the IT expert 234. Upon selecting the "Next" button 236, the customer is
22 presented with a screen, Fig. 16, with a plurality of pull down menus regarding his skills 238.

23 If the customer selects the "Next" button 236, he is presented with a screen, Fig. 17,
24 which requests a plurality of items of information regarding his experience as an IT expert
25 240. If the customer selects the "Next" button 236, he is presented with a screen, Fig. 18,

1 which requests a plurality of items of information regarding references as well as a text box
2 for entering data pertinent to the reference 242.

3 Referring to **Figure 19**, the present invention performs an “aliasing” function
4 to both ensure that communication between the ultimate client and the IT expert occurs
5 through the server of the present invention.

6 When a ticket is open 250, the server creates an alias 252 for the ticket that is open.
7 This alias is assigned to not only the ticket, but is associated with the person or entity that is
8 having the particular problem. In this fashion, the server can always determine who the point
9 of contact is at the customer entity for billing and survey purposes.

10 The ticket number with the associated alias is then made available to IT experts to
11 respond to. When an IT expert accepts the particular troubled ticket 254, the IT expert is
12 assigned an alias 256 which is associated with the ticket alias created 252. This IT expert
13 alias 256 varies from ticket to ticket so that a particular IT expert who accepts five different
14 tickets may in fact have five different aliases associated with the different tickets. All
15 communication with respect to the problem occurs via the server which then associates the
16 various ticket and IT expert aliases and ensures that communication reaches the ultimate
17 customer from the IT expert.

18 When the ticket is closed 258, the various aliases are cleared 260 and these aliases are
19 subsequently made available for further tickets and aliases. Thus, the unique alias for the
20 ticket and for the IT expert accepting the ticket occur only so long as the ticket is opened.
21 Once the ticket is closed, the alias identifiers are made available again for re-use.

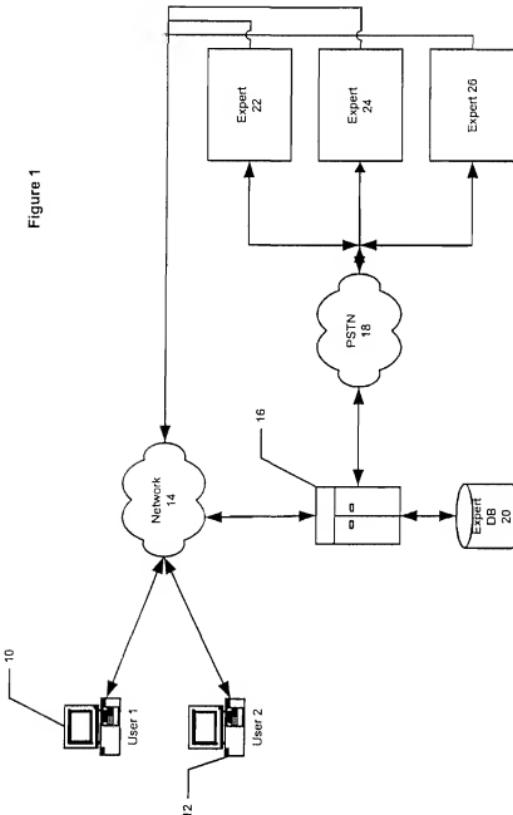
22 It will therefore be apparent to those skilled in the art that other variations of the
23 present invention in contacting IT experts via wired and wireless networks and in contacting
24 customers by the IT experts using both wired and wireless means can be achieved without
25 departing from the scope of the invention as disclosed.

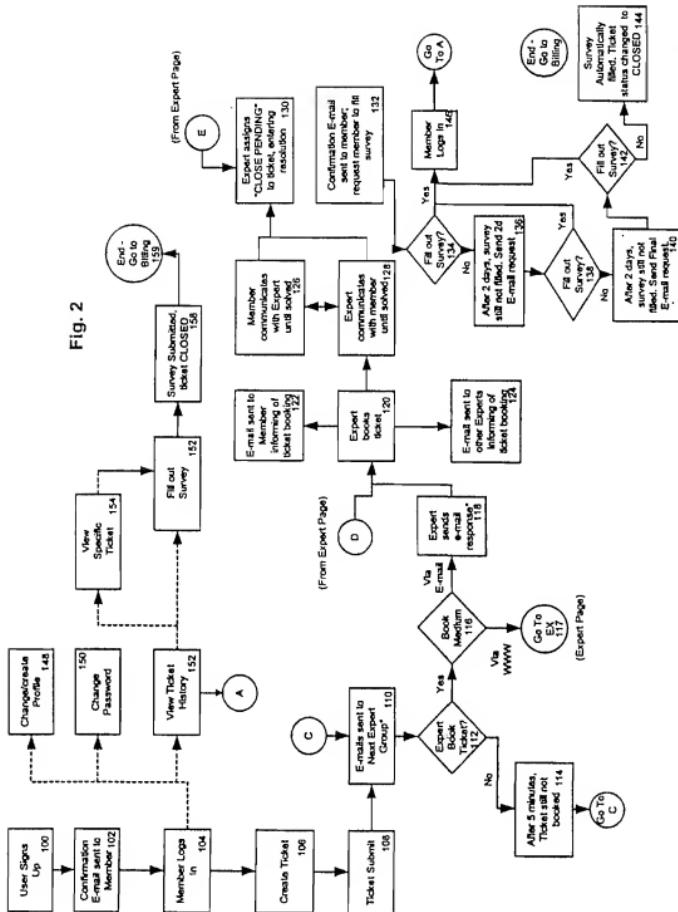
1 I claim:

- 2 1. A system for obtaining IT expert referral comprising:
 - 3 A server further comprising a file of IT experts having qualifications;
 - 4 A network connected to the server for allowing access to the file of IT experts;
 - 5 At least one user computer connected to the network for submitting a request for
 - 6 assistance ticket from a user and for accessing the file of IT experts in the server;
 - 7 The server further comprising assignment instructions for assigning the request for
 - 8 assistance ticket to at least one IT expert for response and for receiving a response
 - 9 from the at least one IT expert to the assignment; and
 - 10 The server further comprising communication instructions for facilitating the
 - 11 communication between the IT expert and the user regarding the request for
 - 12 assistance ticket.
- 13 2. The system for obtaining IT expert referral of claim 1 wherein the server further
- 14 comprises instructions for registering and qualifying IT experts to be resident on
- 15 the file of IT experts.
- 16 3. The system for obtaining IT expert referral of claim 2 wherein the assignment
- 17 instructions further comprise contact information for contacting a the plurality of
- 18 IT experts based upon IT expert qualifications.
- 19 4. The system for obtaining IT expert referral of claim 1 wherein the server further
- 20 comprises instructions for sending a satisfaction questionnaire to the user upon
- 21 completion of the request for assistance ticket by the IT expert to whom the
- 22 request for assistance ticket was assigned.
- 23 5. The system for obtaining IT expert referral of claim 4 wherein the server further
- 24 comprises instructions for creating a quality ranking for the IT expert to whom the
- 25 request for assistance ticket was assigned.

- 1 a server receiving the request for assistance and creating a ticket associated with
2 the request
3 the server communicating the ticket to a plurality of qualified IT experts over a
4 second network;
5 at least one IT expert responding to the ticket
6 the server facilitating communication between the IT expert and the user to solve
7 the ticket.
- 8 13. The method for IT expert referral of claim 12 wherein the plurality of IT experts
9 is created by registering IT experts and verifying their qualifications before
10 communicating the ticket to any one IT expert.
- 11 14. The method for IT expert referral according to claim 12 wherein the first network
12 is the Internet and the second network is the Internet.
- 13 15. The method for IT expert referral according to claim 12 wherein the first network
14 is the Internet and the second network is a PSTN.
- 15 16. The method for IT expert referral according to claim 12 wherein the first network
16 is the Internet and the second network is a wireless network.
- 17 17. The method for IT expert referral according to claim 12 wherein the facilitating of
18 communication comprises the server assigning an alias to the user and an alias to
19 the IT expert; and passing communication between the IT expert and the user
20 through the server by associating the user alias and the IT expert alias.
- 21 18. The method for IT expert referral according to claim 12 further comprising the IT
22 expert closing the ticket with the server upon completion of the ticket by the IT
23 expert and the server submitting a satisfaction survey to the user upon the
24 completion of the ticket by the IT expert.
- 25 19. The method for IT expert referral according to claim 18 further comprising paying

- 1 the IT experts based upon the satisfaction survey.
- 2 20. The method for IT expert referral according to claim 18 further comprising
- 3 creating a ranking of the IT expert based upon the satisfaction survey.
- 4 21. The method for IT expert referral according to claim 20 further comprising
- 5 assigning subsequent tickets to the IT expert based upon the IT expert ranking.
- 6 22. The method for IT expert referral according to claim 17 further comprising the
- 7 server clearing the aliases upon completion of the ticket.
- 8





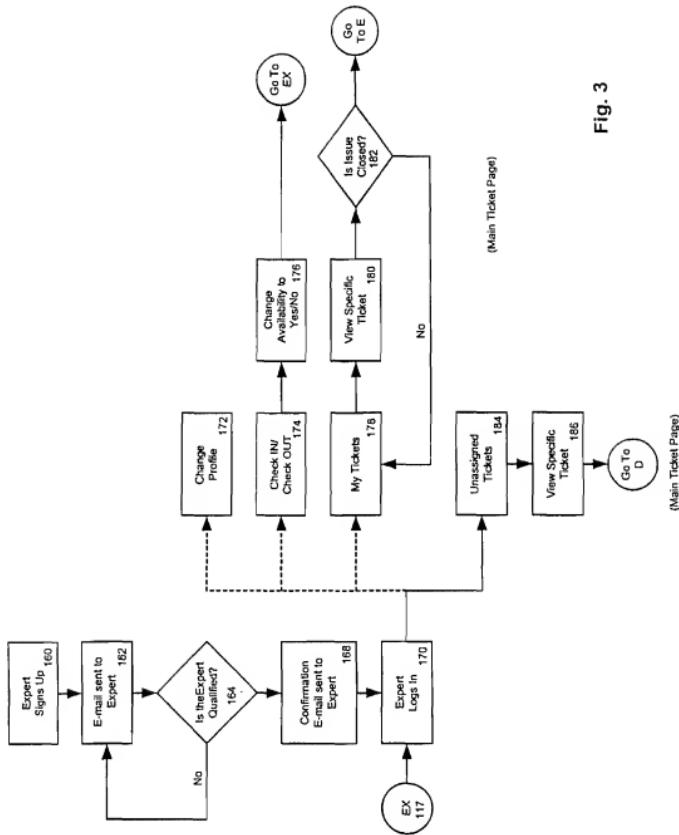


Fig. 3

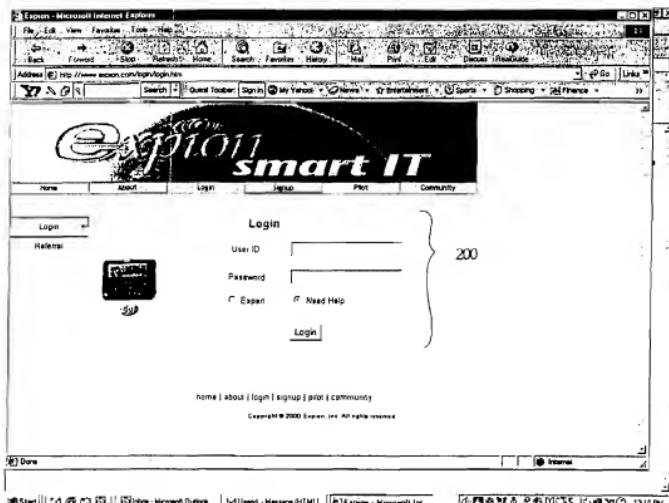


FIGURE 4

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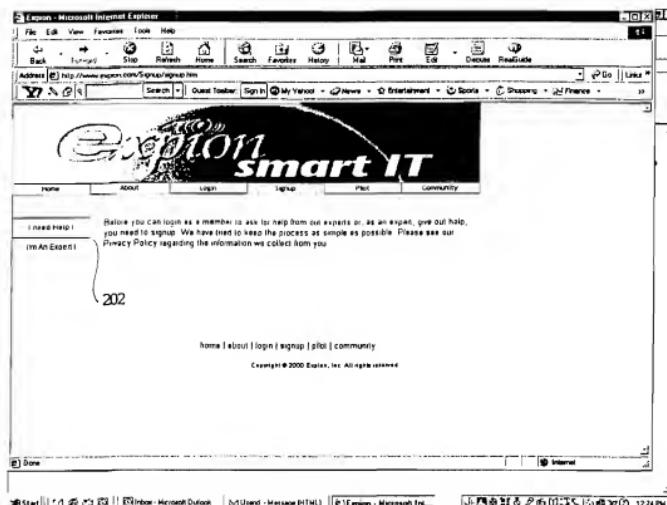


FIGURE 5

The screenshot shows a Microsoft Internet Explorer window with the title bar "E-Helpnet.com - Microsoft Internet Explorer". The address bar contains the URL "http://192.168.0.1/signup/member_member_signup.htm". The page itself is titled "Exp!on smart IT" with a large logo. It features a navigation menu at the top with links for Home, About, Login, Signup, Free Trial, and Community. Below this is a section titled "I Need Help!" with a note: "NOTE: An asterisk (*) indicates a required field." The form fields include:

First name	John
Last name	Smith
Password	*****
Confirm Password	*****
Company	*****
Email	jsmith@aol.com
Address1	123 Main ST
Address2	*****
City	AnyTown
State	AnyCity
ZIP	12131
Country	USA

Below the form, there is a dropdown menu labeled "How Did You Hear About Us" with the option "Read an article" selected. At the bottom of the form are two buttons: "Submit Info" and "Clear Form".

FIGURE 6

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FIGURE 7

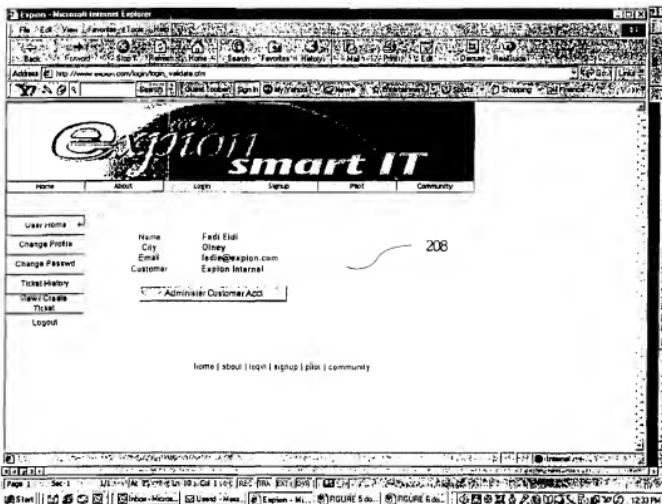


FIGURE 8

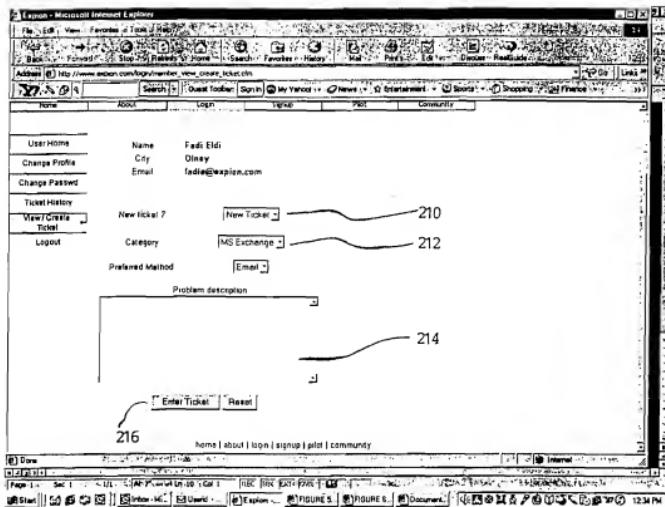


FIGURE 9

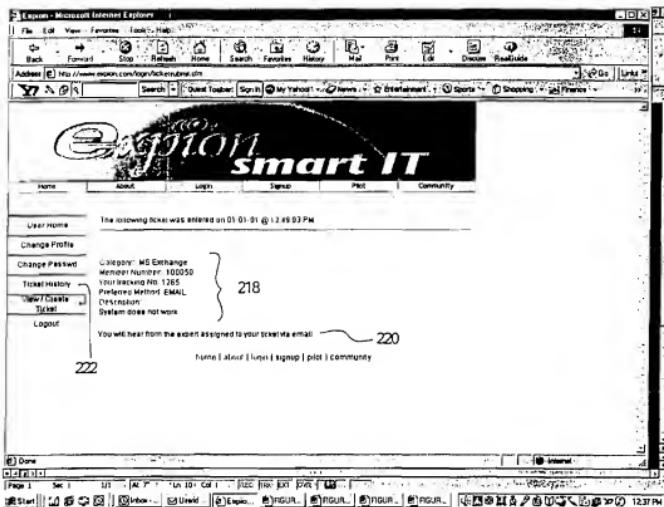


FIGURE 10

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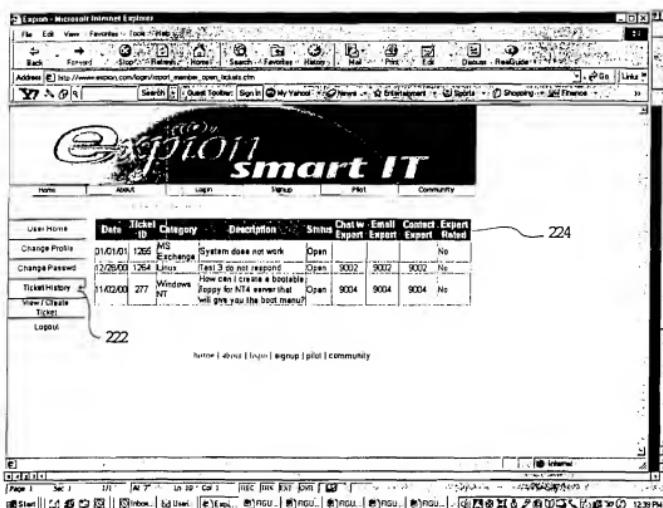


FIGURE 11

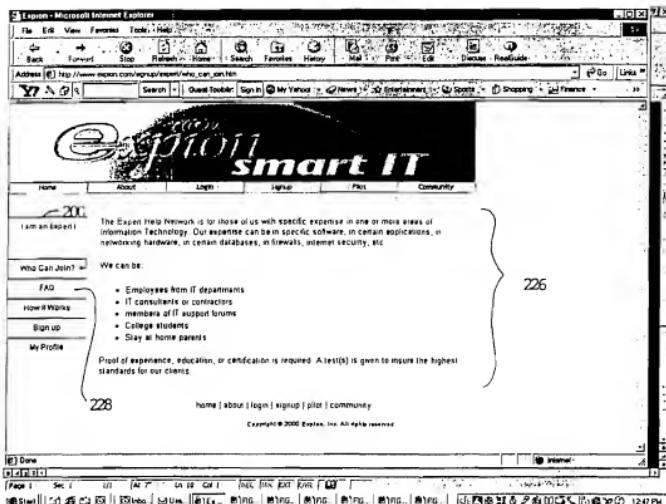


FIGURE 12

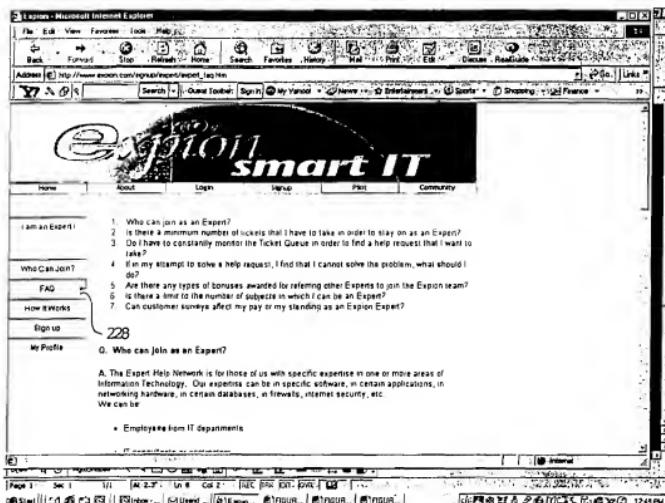


Figure 13

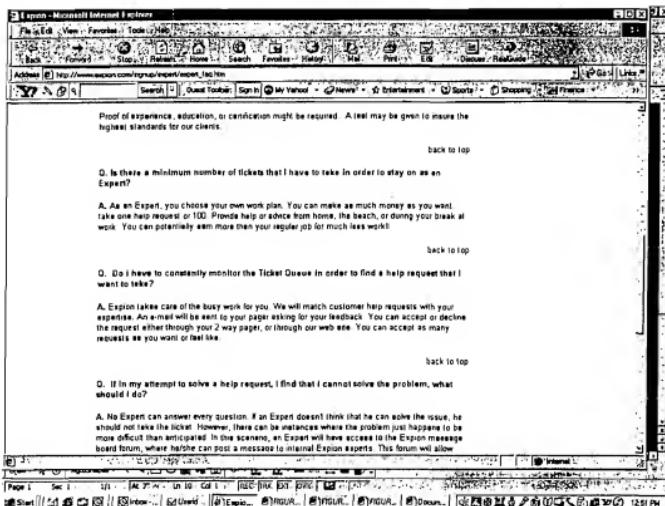


FIGURE 13A

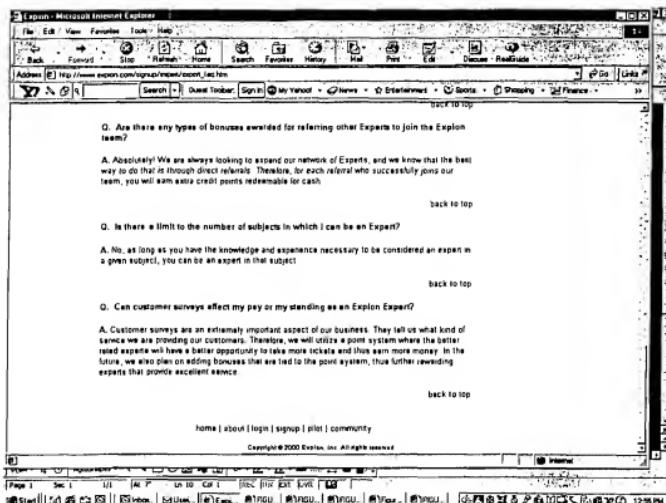


FIGURE 13B



FIGURE 14

2 E-Helpnet.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History Go Links

Address: http://expion-srv1/signup/expert/expert_signup.htm

expion smart IT

Home About Login Signup Free Trial Community

I am an Expert!

CONTACT INFO

Who Can Join?

FAQ How it Works Sign up

First Name: Fadi
Last Name: Elid
Password:
Confirm Password:
By email: Fadiel@expion.com
By phone:
By fax:
By mail:
City: Bethesda
State/province: MD
Postal code: 20817
Country: USA

236

home | about | login | signup | free trial | community

Done Local Intranet 6

236

FIGURE 15

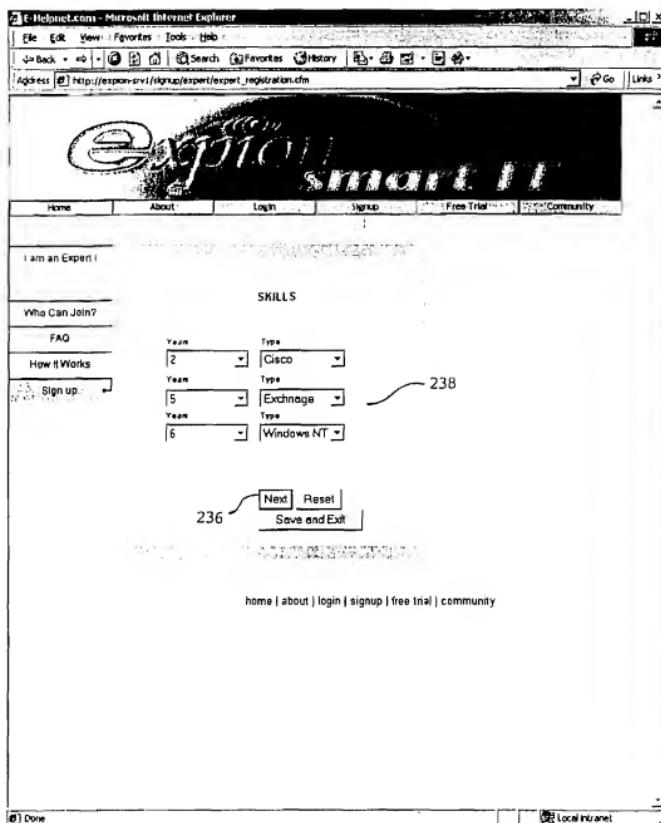


FIGURE 16

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E-HelpNet.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Stop Search Favorites History Stop Go Links

Address http://espon.srv1/signup/expert/expert_registration.htm

Expert smart IT

Home About Login Signup Free Trial Community

I am an Expert!

Who Can Join?

FAQ

How It Works

Sign up

EXPERIENCE

Client/employer TMS

Duration From 01 /1996 To 03 /2000

Your role/title Is Manager

Description Manage Support Group

240

URL

236 Next Reset Save & Exit

Another Experience

home | about | login | signup | free trial | community

Local Intranet

FIGURE 17

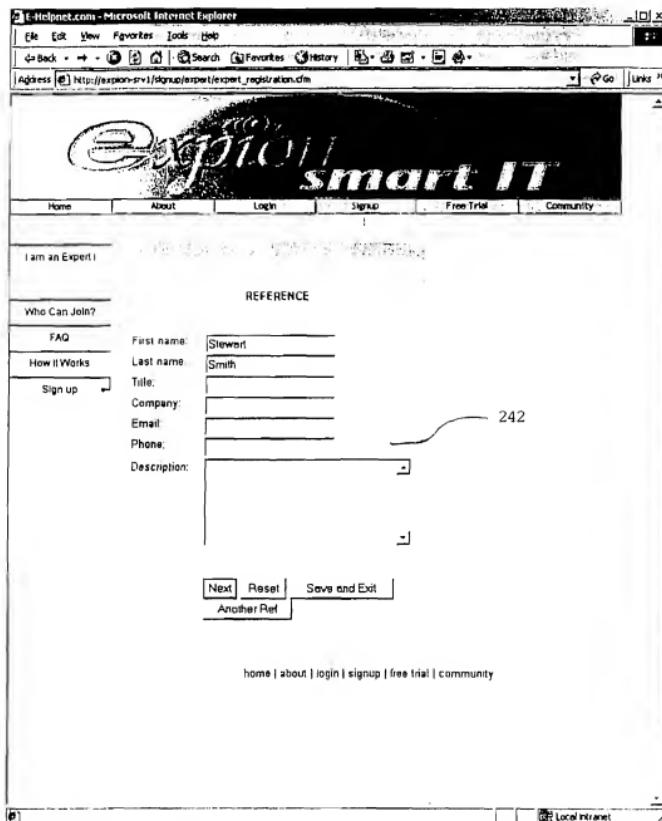


FIGURE 18

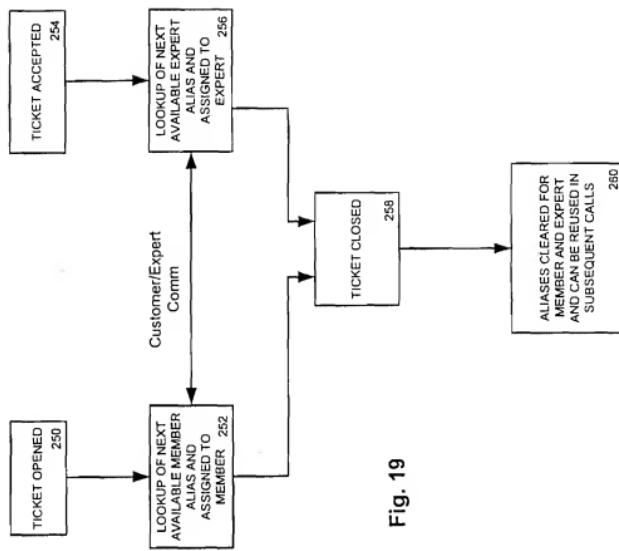


Fig. 19

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For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.



WO 01/39076 A2

(54) Title: SYSTEM AND METHOD FOR PROVIDING INFORMATION TECHNOLOGY IT EXPERT REFERRAL OVER A NETWORK

(57) Abstract:

PATENT COOPERATION TREATY

PCT

DECLARATION OF NON-ESTABLISHMENT OF INTERNATIONAL SEARCH REPORT

(PCT Article 17(2)(a), Rules 13ter.1(c) and Rule 39)

Applicant's or agent's file reference 2590-002PCT	IMPORTANT DECLARATION	Date of mailing(day/month/year) 21/09/2001
International application No. PCT/US 00/ 32028	International filing date(day/month/year) 22/11/2000	(Earliest) Priority date(day/month/year) 23/11/1999
International Patent Classification (IPC) or both national classification and IPC G06F17/60		
Applicant STEPHANOU, Dimitri		

This International Searching Authority hereby declares, according to Article 17(2)(a), that no international search report will be established on the international application for the reasons indicated below.

1. The subject matter of the international application relates to:
 - a. scientific theories.
 - b. mathematical theories
 - c. plant varieties.
 - d. animal varieties.
 - e. essentially biological processes for the production of plants and animals, other than microbiological processes and the products of such processes
 - f. schemes, rules or methods of doing business.
 - g. schemes, rules or methods of performing purely mental acts.
 - h. schemes, rules or methods of playing games.
 - i. methods for treatment of the human body by surgery or therapy.
 - j. methods for treatment of the animal body by surgery or therapy.
 - k. diagnostic methods practised on the human or animal body.
 - l. mere presentations of information.
 - m. computer programs for which this International Searching Authority is not equipped to search prior art.

2. The failure of the following parts of the international application to comply with prescribed requirements prevents a meaningful search from being carried out:

the description the claims the drawings

3. The failure of the nucleotide and/or amino acid sequence listing to comply with the standard provided for in Annex C of the Administrative Instructions prevents a meaningful search from being carried out:

the written form has not been furnished or does not comply with the standard.

 the computer readable form has not been furnished or does not comply with the standard.

4. Further comments:

Name and mailing address of the International Searching Authority  European Patent Office, P.B. 5818 Patentlaan 2 NL-2280 HV Rijswijk Tel: (+31-70) 340-2040, Tx: 31 651 epo nl. Fax: (+31-70) 340-3016	Authorized officer Maria Rodriguez Növoa
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FURTHER INFORMATION CONTINUED FROM PCT/ISA/ 203

The subject-matter claimed in claims 12-22 falls under the provisions of Article 17(2)(a)(i) and Rule 39.1(iii) PCT, such subject-matter relating to a method of doing business.

Claims 1-11 relate to commonplace technological features for performing the business method of the method claims. Although these claims do not literally belong to the method category, they essentially claim protection for the same commercial effect as the method claims. With reference to the Guidelines, B-VIII, points 1-6, the International Searching Authority considers that searching such commercial features would serve no useful purpose. This applies to the remaining commonplace technological features of these claims as well.

The applicant's attention is drawn to the fact that claims relating to inventions in respect of which no international search report has been established need not be the subject of an international preliminary examination (Rule 66.1(e) PCT). The applicant is advised that the EPO policy when acting as an International Preliminary Examining Authority is normally not to carry out a preliminary examination on matter which has not been searched. This is the case irrespective of whether or not the claims are amended following receipt of the search report or during any Chapter II procedure. If the application proceeds into the regional phase before the EPO, the applicant is reminded that a search may be carried out during examination before the EPO (see EPO Guideline C-VI, 8.5), should the problems which led to the Article 17(2) declaration be overcome.